

“HOW TO” GUIDE - FOR EARLY-CAREER RESEARCHER TRAININGS

This guide is intended to provide lessons learned and best practices for developing and implementing an early-career researcher-based training, including integrating educational sessions on interdisciplinary topics. Such a guide can be useful as a blueprint for future regional or national trainings that bring together students, post-docs, and early-career professionals from research organizations, such as the USGS Climate Science Centers. The following guide is split into pre-event, the event itself, and post-event items to consider.

1. Pre-Event

Key Recommendation – A single person cannot develop and implement a successful event by her or himself – it takes a core team of at least 2-3 people in continuous discussion with a number of others in supporting roles. Assign specific roles and deadlines for each member of the project team.

The time periods stated below should be considered a minimum recommended time for completing a task prior to the event. Obviously, if these tasks can be completed earlier it will help make the process go more smoothly.

4-6 months prior to event

- Identify any institutional restrictions that you may have. e.g.,
 - o 18 and over
 - o Citizenship, visa status
 - o Institutional waivers or releases of liability
 - o Institutional talent releases for photography/video
- Identify overarching training session themes
- Create online application
 - o Decide which early-career stage to focus on. (It may be challenging to create relevant curriculum spanning the full range from graduate student to early career professional)
 - Consider splitting into two general groups
 - Master’s and Ph.D. graduate students
 - Postdocs and early career professionals (within five years of having graduated; planning to stay in region)
 - o We found that Ph.D. students also can be included within this group depending on specific end goals but it can be more difficult for Master’s students
 - Either hold a different training for each of the two groups or hold separate tracks for each groups in the same trainings with overlapping activities when appropriate

- Create sufficient questions to collect all relevant info you might need to make a decision on applicants (<http://drive.google.com/> allows for the creation of free web forms)
 - Contact info
 - Location of residence during training time period (for travel funding purposes)
 - Major/discipline
 - Current Position
 - College/University/Organization
 - Research area of focus
 - Confirmation they will sign all required waivers if selected to attend
 - Whether they are 18 or older (if applicable)
 - Letter(s) of recommendation
 - Short essay (~4000 characters) on why they would like to attend the training and how they feel it would benefit their future career goals
 - Short essay describing their research
 - Optional items to include
 - Gender
 - Ethnicity and race (see: <http://nces.ed.gov/ipeds/reic/definitions.asp>)
 - Include information about training (see announcement section below) in case someone is forwarded the application website only
 - Use a tracker mechanism (e.g., <http://goo.gl/>) to get an idea of how many people are interested, where they might be clicking through to the application from, and if you need to disseminate information additional times or to a larger audience
 - Send an immediate confirmation email when someone applies online so they know their application was received (make it an automated process if possible)
- Reserve hotels, vehicles, meeting rooms, catering, field trips, and transportation. Do this well ahead of time. You can always cancel. If exact timing is uncertain, consider reserving multiple days/times to make sure you are in the books.
 - Catering/food: find out if you have a dollar limit per person for meals to stay under and what the rules are in your grant or funding account to purchase food
 - Hotels: Ensure that you stay within federal limits (see: <http://www.gsa.gov/portal/category/100120>)
 - Follow all of your organization's purchasing policies and procedures for food purchases and housing contracts (allow sufficient time for approvals)
 - Allow sufficient time to set up vendors (some universities/organizations have vendor restrictions)
 - Create event announcement (distribute to relevant groups/organizations)
 - Include relevant information about the event
 - Learning objectives and anticipated outcomes
 - Event dates/times (and portion of required attendance)
 - Tentative agenda
 - Requirements (see example institutional requirements above)
 - Funding availability
 - Lodging/travel options (include any monetary limits on available funding)

- Approximate number of participants to be selected
- Link to online application

3-4 months prior to event

- Application submission due date
- Process applications (have at least two people individually score all application essays, recommendation letters, and any other measures such as applicant overall suitability)
- Notify accepted applicants
 - Include finalized versions of all relevant logistical information about the training so applicants have what they need to officially confirm their participation (e.g., timing, funding, lodging)
- Receive accepted applicant's official confirmation of their participation
- Email those applicants not accepted after confirmations are due (in case you need to make substitutions). Keep the email positive and encourage them to apply to future similar events.
- Begin laying out an agenda
 - Mix up classroom lectures with other activities outside of the classroom
 - Provide sufficient time for breaks between sessions for networking
- Identify instructors/speakers for each session
 - Include end users/managers/stakeholders/decision makers
 - Invite dynamic speakers
 - Include a diverse group of speakers (gender, ethnicity, career stage)
 - Build the agenda around speaker schedules (approach those with the busiest schedule first and early and lock them into a spot; then build the rest of the agenda)
- Finalize Field Trips
 - Ensure that participants can enter secure facilities (e.g., check restrictions on foreign citizens in Federal facilities)
- Create tentative agenda (send to participants and instructors)
- Create small working group topics
- Test seminar room audio/video/recording capability
- Test all video web conferencing (Have a backup. Sometimes things work during practice but not live.)
- Find eligible drivers for local transportation (e.g., vans)
- Create a master list of required items (e.g., materials, audio/video, computers, food, beverages)
- Identify any changes needed if 1-5 confirmed participants back out of the workshop (e.g., hotel rooms, vehicles required, food, etc.). Keep in mind this can (and has) happened on the first day of the event.

1-2 months prior to event

- Create detailed feedback form for participants
 - List each instructor, event, and trip separately to get detailed feedback on which aspects of the program were most successful and which could be improved
 - For written feedback portions have separate sections for positive comments and suggested improvements.
- Assemble instructor and participant bios to distribute to participants when they arrive.
 - Attain instructor mailing addresses for sending them a thank you note after the event.

3-4 weeks prior to event

- Create master “To Do” timeline spreadsheet with what everyone involved is responsible for throughout the week hour-by-hour
 - o This not only ensures everyone knows their roles but also is useful in case of illness/emergency to one of those involved in helping
 - o Keep list in a shared folder for all to see any updates (e.g., dropbox, google docs)
- Create final agenda (have multiple people look over line by line)
- Acquire all materials needed (e.g., folders, pens, nametags)
- Print all documents to be handed out (e.g., agenda, activity instructions, participant/instructor bios)
- Obtain necessary parking permits for the training facility

1-2 weeks prior to event

- Acquire all speaker/participant presentations (or at least drafts that can be updated) so their compatibility can be tested on the computer used at the training)
- Do an official test of technology to be used with anyone instructing remotely
- Purchase any beverages and food that can be stored

2. During Event

- Provide coffee and water at a minimum of 30 minutes before the event begins to the end
- Provide local transportation for attendees
- Be prepared to accept reimbursement for food from Federal employees, if they choose (typically, this is cash and they will need a receipt)
- At the beginning of each day, describe what is planned for that day and how it relates to the overall goals of the training
 - o Also, at the beginning of each session, describe why the session was included and where it fits into the overall goals of the training
- Have a person identified as the designated “runner” during the week who can take care of unexpected tasks needing immediate attention (e.g., picking up someone from hotel who missed bus, food/snacks preparation, quick printing, computer setup help)
- Don’t expect every detail of the training to work perfectly. Unforeseen things can and will occur.
- Encourage participants to fill out their feedback forms daily so things are fresh in their mind.
- Have all training attendees fill out a Talent Release form if video/photos will be taken and used for informational/promotional material after the training is complete.
- Provide any participant compensation at the end of the training (and make sure participants know this ahead of time). This will help keep participants at the training throughout its entirety.
 - o Useful to tell them they will receive their compensation money when they turn in their feedback information
- Have someone designated to take photographs and video throughout the training
 - o Conduct video interviews of participants and instructors throughout the week to get their impression of the training

- Provide opportunities to socialize outside of the training activities (e.g., at the hotel in the evening or a local restaurant)

3. Post-Event

- Send a thank you note to each instructor and others helping with event
- Make available to attendees:
 - Presentation video/slides
 - Photos
 - Instructor and participant bios and contact information
- Develop a means for all attendees to maintain contact after training is complete (e.g., social media, website)
- Invite training participants to future events associated with your organization